

Contract Number 2021C-714

21-1200-215
State Auditor Number

DEPARTMENT OF EDUCATION
STATE OF SOUTH DAKOTA
CONSULTANT CONTRACT
FOR CONSULTANT SERVICES BETWEEN

American Institutes for Research
1400 Crystal Drive, 10th Floor
Arlington, VA 22202

Division of Learning and Instruction
South Dakota Department of Education
800 Governors Drive
Pierre, SD 57501-2294

Hereinafter referred to as Consultant

Hereinafter referred to as State

The State hereby enters into this Agreement for services with Consultant in consideration of and pursuant to the terms and conditions set forth herein.

1. The Consultant's services under this Agreement shall commence on May 24, 2021 and end on April 30, 2022, unless sooner terminated pursuant to the terms hereof. This Agreement may be renewed at the initiative of the State, and if mutually agreed upon by both parties, for one additional one-year term.

2. The State will make payment for services upon satisfactory completion of the services. The TOTAL CONTRACT AMOUNT is an amount not to exceed \$227,179.00. The State's total liability for all services, including expenses, is limited to this total contract amount. This amount may only be increased upon the written agreement of Consultant and the State, and such agreement must specifically reference this paragraph. Payment will be made by the State upon receipt of Consultant invoices and in accordance with the budget below.

Deliverable 1	\$13,335.00
Deliverable 2	\$16,676.00
Deliverable 3	\$64,178.00
Deliverable 4	\$33,385.00
Deliverable 5	\$99,605.00
Total	\$227,179.00

3. The State will not pay Consultant's expenses as a separate item.

4. The Consultant agrees to:

a. Deliverable 1: Provide a Facilitator with a social studies background to work with the State to select and facilitate a workgroup of up to 56 participants to revise the Social Studies content standards with three to five participants in each grade level K-8 and domain in grades 9-12. One participant for each grade level will serve as a table lead. The participants shall demonstrate best practices in using or engaging with content standards and/or other related professional experiences.

i. The participants must include:

1. SD K-12 educators who teach social studies content standards
2. School leaders, curriculum directors, or administrators
3. Board of Regents/Board of Technical Education/Other University Professionals
4. Business/Industry/School Board/Parents

- b. Deliverable 2: The Facilitator will work with the State to develop a process for the standards revision process. The Facilitator will complete the following objectives:
 - i. Work with the State to understand the processes and goals for the 2021 meetings beginning in May.
 - ii. Review College, Career and Civic Life (C3) Framework and current South Dakota social studies content standards and other State identified sources.
 - iii. Conduct reviews of current research in Social Studies education and national and state work around Social Studies Standards.
 - iv. Develop presentations and facilitation processes for revision meetings.
 - v. Develop a decision-making guide outlining a process on when to revise standards (structure and content).
 - vi. Create a process guide for writing team to revise the standards, architecture and provide justifications.
- c. Deliverable 3: The Facilitator will work with the State to guide and facilitate the revision process for up to 10 virtual/face-to-face meetings, each 7 hours in length. Technology costs are included. The Facilitator will complete the following objectives:
 - i. Facilitate writing team meetings to develop recommendations for revisions.
 - ii. Provide examples of other state standards architectures.
 - iii. Develop a recording tool to document revisions throughout the process.
 - iv. Facilitate writing team in making changes to standards, architecture and providing justifications for recommendations.
 - v. Create a report outlining the writing team recommendations.
 - vi. Develop process to ensure final revisions are recorded.
- d. Deliverable 4: The Facilitator will work with the State to finalize the standards documents. The Facilitator will complete the following objectives:
 - i. Put standards into user friendly format.
 - ii. Meet with the State as needed during the revision and public hearing process.
 - iii. Develop process/protocol to guide review of the draft standards.
 - iv. Work with State to make changes and provide justifications for recommendations.
 - v. Finalize changes.
 - vi. Create final document.
 - vii. Submit all reviewed items to the State by July 16, 2021.
 - viii. Revise standards as needed as specified from Board of Education hearings held in September 2021, November 2021, January 2022, and March 2022.
- e. Deliverable 5: The Facilitator will work with the State to manage the technical writing committee in their revisions of the standards. This includes facilitating the payment of stipends in the amount of up to \$175.00 per day for up to 42 workgroup members and \$225.00 per day for up to 14 table leads, for up to 56 total committee members, and preparing all documentation and accounting associated with the stipend payments.
 - i. Deliverable 5a: Submit all payment documentation upon completion of work.
 - ii. Deliverable 5b: Ensure completion of all necessary tax forms, including, but not limited to, W-9s.
- f. The exhibits listed below are attached to this Agreement and by this reference incorporated herein as if set forth in full. If there is a conflict among the documents comprising this Agreement, then the conflict shall be resolved by utilizing the following order of precedence:

EXHIBITS

1. The terms of this Agreement as may be amended.
2. Exhibit A – RFP #2258, Consultant's Proposal

5. The Consultant will not use State equipment, supplies or facilities.
6. The Consultant, at all times during the term of this Agreement, shall obtain and maintain in force insurance coverage of the types and with the limits as follows:

- a. Commercial General Liability Insurance:

The Consultant shall maintain occurrence based commercial general liability insurance or equivalent form with a limit of not less than \$1,000,000.00 for each occurrence. If such insurance contains a general aggregate limit it shall apply separately to this Agreement or be no less than two times the occurrence limit.

- b. Business Automobile Liability Insurance:

The Consultant shall maintain business automobile liability insurance or equivalent form with a limit of not less than \$1,000,000.00 for each accident. Such insurance shall include coverage for owned, hired and non-owned vehicles.

- c. Worker's Compensation Insurance:

The Consultant shall procure and maintain workers' compensation and employers' liability insurance as required by South Dakota law.

- d. Professional Liability Insurance or Miscellaneous Professional Liability Insurance:

The Consultant agrees to procure and maintain professional liability insurance or miscellaneous professional liability insurance with a limit not less than \$1,000,000.00.

7. Any notice or other communication required under this Agreement shall be in writing and sent to the address set forth above. Notices shall be given by and to **Melinda Johnson** on behalf of the State, and by **Beth Ratway**, on behalf of the Consultant, or such authorized designees as either party may from time to time designate in writing. Notices or communications to or between the parties shall be deemed to have been delivered when mailed by first class mail, provided that notice of default or termination shall be sent by registered or certified mail, or if personally delivered, when received by such party.

8. While performing services hereunder, the Consultant is an independent contractor and not an officer, agent or employee of the State of South Dakota. The Consultant will provide the State with its Employer Identification Number, Federal Tax Identification Number or Social Security Number upon execution of this Agreement.

9. Consultant agrees to hold harmless and indemnify the State of South Dakota, its officers, agents and employees, from and against any and all actions, suits, damages, liability or other proceedings which may arise as a result of performing services hereunder. This section does not require the Consultant to be responsible for or defend against claims or damages arising solely from errors or omissions of the State, its officers, agents or employees.

10. Consultant agrees to report to the State any event encountered in the course of performance of this Agreement which results in injury to the person or property of third parties, or which may otherwise subject Consultant or the State to liability. Consultant shall report any such event to the State immediately upon discovery. Consultant's obligation under this paragraph shall only be to report the occurrence of any event to the State and to make any other report provided for by Consultant's duties or applicable law. Consultant's obligation to report shall not require disclosure of

any information subject to privilege or confidentiality under law (e.g., attorney-client communications). Reporting to the State under this paragraph shall not excuse or satisfy any obligation of Consultant to report any event to law enforcement or other entities under the requirements of any applicable law.

11. The Consultant will comply with all federal, state and local laws, regulations, ordinances, guidelines, permits and requirements applicable to providing services pursuant to this Agreement, and will be solely responsible for obtaining current information on such requirements.

12. The Consultant may not use subcontractors to perform the services described herein without the express prior written consent of the State. The Consultant is solely responsible for the performance of any subcontractor. The Consultant will include provisions in its subcontracts requiring its subcontractors to comply with the applicable provisions of this Agreement, to indemnify the State, and to provide insurance coverage for the benefit of the State in a manner consistent with this Agreement. The Consultant will cause its subcontractors, agents, and employees to comply with applicable federal, state and local laws, regulations, ordinances, guidelines, permits and requirements and will adopt such review and inspection procedures as are necessary to assure such compliance.

13. This Agreement may not be assigned without the express prior written consent of the State. An assignment may not operate to relieve Consultant of any of its duties and obligations under this Agreement, nor may such assignment affect any remedies available to the State that may arise from any breach of the provisions of the Agreement, including but not limited to rights of setoff. Any attempted assignment, transfer or delegation in contravention of this paragraph shall be null and void. This Agreement shall inure to the benefit of and be binding on the parties hereto and their permitted successors and assigns.

14. The Consultant hereby acknowledges and agrees that all reports, plans, specifications, technical data, miscellaneous drawings, software system programs and documentation, procedures, or files, operating instructions and procedures, source code(s) and documentation, including those necessary to upgrade and maintain any software program, and all information contained therein provided to the State by the Consultant in connection with its performance of services under this Agreement shall belong to and is the property of the State and will not be used in any way by the Consultant without the written consent of the State. Papers, reports, forms, software programs, source code(s) and other material which are a part of the work under this Agreement will not be copyrighted without written approval of the State.

15. The Consultant certifies that neither Consultant nor its principals are presently debarred, suspended, proposed for debarment or suspension, or declared ineligible from participating in transactions by the federal government or any state or local government department or agency. The Consultant further agrees that it will immediately notify the State if during the term of this Agreement Consultant or its principals become subject to debarment, suspension or ineligibility from participating in transactions by the federal government, or by any state or local government department or agency. The Consultant further certifies that neither it nor its principals have, within a three (3) year period preceding the awarding of this Agreement, been convicted of or had a civil judgment rendered against it for commission of fraud or been convicted of a criminal offense in connection with obtaining, attempting to obtain, or performing a federal, state, or local transaction or contract or been convicted of a violation of federal or state antitrust statutes, embezzlement, theft, forgery, bribery, falsifications, destruction of records, making false statements, or receiving stolen property. Consultant further certifies that neither it nor its principals have, within a three (3) year period preceding this contract, had a federal, state, or local transaction terminated for cause or default.

16. The award of this Agreement to Consultant is not in any way an endorsement of Consultant or Consultant's services by the State and may not be so represented by Consultant in any advertising or publicity materials. Consultant agrees to submit to the State all advertising, sales promotion, and other publicity relating to this Agreement wherein the State's name is mentioned or language is used from which the connection of the State's name therewith may, in the State's judgment, be inferred or implied. Consultant further agrees not to publish or use such advertising, sales promotion, or publicity

without the prior written consent of the State. Consultant may not in any way contract on behalf of or in the name of the State, nor may Consultant release any informational pamphlets, notices, press releases, research reports, or similar public notices concerning this Agreement without obtaining the prior written approval of the State.

17. Payment will be made pursuant to itemized invoices submitted with a signed state voucher. Each invoice must reference the Agreement number and provide detailed information in a format as requested by the State. Payment will be made consistent with SDCL Ch. 5-26. Consultant acknowledges that it would be difficult or impracticable for the State to provide the notice of disagreement provided for by SDCL 5-26-5 within the thirty days provided by that section. Accordingly, Consultant hereby waives the application of that section to this Agreement.

18. The payment of any invoice by the State will not prejudice the State's right to object to or question that or any other invoice or matter in relation thereto. The Consultant shall promptly, but in all cases within thirty days of notification, pay to the State the full amount of any erroneous payment or overpayment upon notice of an erroneous payment or overpayment to which Consultant is not entitled. If Consultant fails to make such a timely refund, the State shall charge Consultant one percent (1%) per month on the amount due until paid in full.

19. The State is a sovereign entity, and shall not be liable for the payment of federal, state and local sales, use and excise taxes, including any interest and penalties from any related deficiency, which may become due and payable as a consequence of this Agreement.

20. Amounts due to the State by Consultant, including but not limited to damages, or claims for damages, may be deducted or set-off by the State from any money payable to Consultant pursuant to this Agreement.

21. Consultant shall maintain documentation for all work performed or money received under this Agreement for a period of five (5) full years following completion of this Agreement. This documentation may be subject to audit, at any reasonable time and upon reasonable notice, by State or federal authorities.

22. Claims for payment must be submitted on an invoice within forty-five (45) days of the date upon which the Consultant knew or should have known of the claim or forty-five (45) days after the termination or expiration of this Agreement, whichever is earlier. If an invoice cannot be submitted within forty-five days, then written notice and an explanation of need must be provided to the State for consideration of an extension, which shall be in the sole discretion of the State. Failure of the Consultant to abide by this paragraph shall relieve the State of any obligation to pay for such claim.

23. This Agreement may be terminated by either party hereto upon thirty (30) days written notice. In the event the Consultant breaches any of the terms or conditions hereof, this Agreement may be terminated by the State at any time with or without notice. If termination for such a default is effected by the State, any payments due to Consultant at the time of termination may be adjusted to cover any additional costs to the State because of Consultant's default. Upon termination the State may take over the work and may award another party an agreement to complete the work under this Agreement. If after the State terminates for a default by Consultant it is determined that Consultant was not at fault, then the Consultant shall be paid for eligible services rendered and expenses incurred up to the date of termination.

24. This Agreement depends upon the continued availability of appropriated funds and expenditure authority from the Legislature for this purpose. If for any reason the Legislature fails to appropriate funds or grant expenditure authority, or funds become unavailable by operation of law or federal funds reductions, this Agreement will be terminated by the State. Termination for any of these reasons is not a default by the State nor does it give rise to a claim against the State.

25. The parties mutually agree that neither of them shall disclose the contents of the agreement except as required by applicable law or as necessary to carry out the terms of the agreement or to enforce that party's rights under this agreement. Consultant acknowledges that the State and its agencies are public entities and thus are bound by South Dakota open meetings and open records laws. It is therefore not a breach of this agreement for the State to take any action that the State reasonably believes is necessary to comply with the South Dakota open records or open meetings laws, including but not limited to posting this Agreement on the State's website. If work assignment performed in the course of this Agreement required security requirements or clearance, the Consultant will be required to undergo investigation.

26. This Agreement shall be governed by and construed in accordance with the laws of the State of South Dakota. Any lawsuit pertaining to or affecting this Agreement shall be venued in Circuit Court, Sixth Judicial Circuit, Hughes County, South Dakota.

27. All other prior discussions, communications and representations concerning the subject matter of this Agreement are superseded by the terms of this Agreement, and except as specifically provided herein, this Agreement constitutes the entire agreement with respect to the subject matter hereof.

28. This agreement may not be amended except in writing, which writing shall be expressly identified as a part hereof, and be signed by an authorized representative of each of the parties hereto.

29. In the event that any court of competent jurisdiction shall hold any provision of this Agreement unenforceable or invalid, such holding shall not invalidate or render unenforceable any other provision hereof.

30. No remedy conferred by any of the specific provisions of the Agreement is intended to be exclusive of any other remedy, and each and every remedy may be cumulative and may be in addition to every other remedy given under this agreement, not and hereafter existing at law or in equity or by statute or otherwise. The election of any one or more remedies by either party shall not constitute a waiver of the right to pursue other available remedies.

31. Pursuant Executive Order 2020-01, for Consultants with five (5) or more employees who enter into an agreement with the State of South Dakota that involves the expenditure of one hundred thousand dollars (\$100,000) or more, by signing this Agreement the Consultant certifies and agrees that it has not refused to transact business activities, have not terminated business activities, and has not taken other similar actions intended to limit its commercial relations, related to the subject matter of the agreement, with a person or entity that is either the State of Israel, or a company doing business in or with Israel or authorized by, licensed by, or organized under the laws of the State of Israel to do business, or doing business in the State of Israel, with the specific intent to accomplish a boycott or divestment of Israel in a discriminatory manner. It is understood and agreed that, if this certification is false, such false certification will constitute grounds for the State to terminate this agreement. The Consultant further agrees to provide immediate written notice to the State if during the term of the agreement it no longer complies with this certification and agrees such noncompliance may be grounds for contract termination.

32. Except as otherwise specifically provided herein, any failure or delay by either party to exercise or partially exercise any right, power or privilege under this Agreement may not be deemed a waiver of any such right, power, or privilege under this Agreement. Any waivers granted by the State for breaches hereof shall not indicate a course of dealing of excusing other or subsequent breaches. The State's pursuit or non-pursuit of a remedy under this Agreement for Consultant's breach of its obligations will neither constitute a waiver of any such remedies or any other remedy that the State may have at law or equity for any other occurrence of the same or similar breach, nor prevent the State from pursuing such remedy.

33. The parties expressly agree that no provision of this Agreement is in any way intended to constitute a waiver by the State of any immunities from suit or from liability that the State may have by operation of law.

This Agreement is intended to govern only the rights and interest of the parties named herein. It is not intended to, does not and may not be relied upon to create any rights, substantial or procedural, enforceable at law by any third party in any matters, civil or criminal.

In witness hereto the parties signify their agreement by signature affixed below:

DocuSigned by:
Melinda Johnson 05/20/2021
F04DCDA31929428...
Melinda Johnson

Program Staff Signature (Date)

DocuSigned by:
Jann Mauer 05/26/2021
5268F1FB52144D3...
Jann Mauer

Consultant Signature (Date)

DocuSigned by:
Cody Stoeser 05/25/2021
8322AD04886E42D...
Cody Stoeser

Authorized State Representative (Date)
Department of Education

State Agency Coding: (Center/Company/Account)
State Agency contact who can provide additional
information regarding this contract:

1232920274S0/2024/520413009

Melinda Johnson 605-295-0433



Response to RFP No. 2258

Facilitation of the Revision of the South Dakota Social Studies Content Standards

TECHNICAL PROPOSAL

March 03, 2021

Submitted to: Rochelle Kenzy
Department of Education
800 Governors Drive
Pierre, SD 57501-3182
Email: Rochelle.Kenzy@state.sd.us

Submitted by: American Institutes for Research®

TECHNICAL CONTACT
Beth Ratway
1400 Crystal Drive, 10th Floor
Arlington, VA 22202-3289
Phone: 262-915-0164
Email: bratway@air.org

CONTRACTUAL CONTACT
Gaye Iovinelli
Senior Contracts Officer
630-649-6537
airproposals@air.org

Dun and Bradstreet Number: 04-173-3197 Tax Identification Number (TIN): 25-0965219

This proposal includes proprietary and business confidential data and shall not be disclosed outside the South Dakota Department of Education and shall not be duplicated, used, or disclosed—in whole or in part—for any purpose other than to evaluate this proposal. However, if an agreement is awarded to this offeror as a result of—or in connection with—the submission of these data, the South Dakota Department of Education shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting agreement. This restriction does not limit the South Dakota Department of Education's right to use the information contained in these data if they are obtained from another source without restriction. Notice of Trademark: "American Institutes for Research" and "AIR" are registered trademarks. All other brand, product, or company names are trademarks or registered trademarks of their respective owners.

Facilitation of the Revision of the South Dakota Social Studies Content Standards Technical Proposal

March 2021

**Beth Ratway
Bobbi Newman**



AMERICAN INSTITUTES FOR RESEARCH®

1400 Crystal Drive, 10th Floor
Arlington, VA 22202-3289
202.403.5000

www.air.org

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AMERICAN INSTITUTES FOR RESEARCH®

March 3, 2021

Rochelle Kenzy
Department of Education
800 Governors Drive
Pierre, SD 57501-3182

RE: RFP #2258 Facilitation of the Revision of the Social Studies Content Standards

Dear Rochelle Kenzy:

The American Institutes for Research (AIR) is pleased to submit its proposal, *Facilitation of the Revision of the South Dakota Social Studies Content Standards*.

Founded in 1946, AIR is one of the largest not-for-profit behavioral and social science research and evaluation organizations in the world. We are committed to empowering communities and institutions with innovative solutions to the most critical challenges in education, health, workforce productivity, and international development.

AIR has a strong foundation in facilitating standards review, revision, and implementation, incorporating research and evidence-based practices throughout the process. We bring a deep understanding of social studies content and an established set of protocols and processes to support standards revisions, so we are ready to go on Day 1 of the contract. Our process is collaborative and involves close coordination with state and local stakeholders. AIR has worked with government agencies as well as public and private organizations, including state and local government agencies, state and local education agencies, foundations, corporations, courts, and schools, both in the United States and abroad. Our project management approach places a high value on responsiveness, flexibility, product quality, and timeliness, and AIR has earned a national and international reputation for efficiently and effectively conducting work that consistently meets the needs of our clients.

AIR proposes a team led by Beth Ratway, who will serve as project director and lead the technical assistance activities. Ms. Ratway has extensive social studies experience. For example, she taught high school social studies for 15 years, served at the Wisconsin Department of Public Instruction as the social studies consultant for 5 years, and has more than 10 years working at AIR supporting states in social studies standards development, revision, and implementation.

Our AIR team is prepared and ready to start work with South Dakota Department of Education to produce redeveloped K–12 social studies content standards. In our proposal, we outline five tasks that will ensure the revision process will result in a comprehensive set of social studies standards for South Dakota.

South Dakota Department of Education
March 3, 2021

We have enclosed one original copy of the proposal and all attachments. Also enclosed, in PDF electronic format on a flash drive, is the proposal and all attachments, as requested.

Please direct contractual questions about this proposal to Gaye Iovinelli, senior contracts officer, at 630-649-6537 or AIRproposals@air.org. For technical questions, please contact Beth Ratway at 262-915-0164 or bratway@air.org.

Thank you for your consideration.

Sincerely,

Mary Ann Fox
Vice President
Education Statistics

3.3.1 RFP Form

The State's Request for Proposal (RFP) Form completed and signed and included on the next page.

STATE OF SOUTH DAKOTA
DEPARTMENT OF EDUCATION
800 GOVERNORS DRIVE
PIERRE, SOUTH DAKOTA 57501-3182

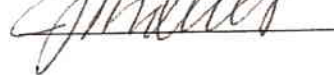
Facilitation of the Revision of the Social Studies Content Standards
PROPOSALS DEADLINE: March 12, 2021 by 5:00 PM CT

RFP #: 2258

Buyer: Rochelle Kenzy

Phone: (605) 773-8063

REQUEST FOR PROPOSAL FORM

FIRM NAME: American Institutes for Research AUTHORIZED SIGNATURE: 
ADDRESS: 1400 Crystal Drive, 10th Floor TYPE OR PRINT NAME: Jann Mouer
CITY/STATE: Arlington, VA TELEPHONE NO: 202-403-6213
ZIP (9 DIGIT): 22202-3289 FAX NO: 202-403-5000
FEDERAL TAX ID#: 25-0965219 E-MAIL: AIRproposals@air.org

PRIMARY CONTACT INFORMATION

CONTACT NAME: Beth Ratway TELEPHONE NO: 262-951-0164
FAX NO: 202-403-5000 E-MAIL: bratway@air.org

3.3.2 Executive Summary

The American Institutes for Research (AIR), a 501(c)(3) not-for-profit organization, is pleased to submit this proposal to the South Dakota Department of Education (SD DOE) to produce a revised set of Social Studies Content Standards by November 2021. AIR is ready and able to fulfil all requirements within the RFP, and there are no requirements outlined in the RFP that we cannot fulfil.

We bring a deep understanding of social studies content and an established set of protocols and processes to support standards redevelopment and revision, so we are ready to go on Day 1 of the contract. In addition, AIR's understanding of the current landscape for students, and its expertise in supporting student learning from various backgrounds afford the organization the ability to quickly begin the work to support the social studies standards revision process in partnership with SD DOE. AIR has worked collaboratively with SD DOE and state stakeholders on past projects. Examples of these collaborations include supporting the state's Elementary and Secondary Education Act waiver application and providing student learning objectives guidance specific to teachers supporting students with disabilities. AIR hosted SD DOE and other state leaders in the State Education Agency American Indian Education Community of Practice. And AIR provided technical assistance support to SD DOE for the Prevention and Intervention Programs for Children and Youth Who Are Neglected, Delinquent, or At Risk. AIR also provides technical assistance to the state coordinator and alternate of the SD Title IV, Part A program through consultations, facilitating webinars, identifying subject matter experts, and making connections across states to support program implementation in the areas of well-rounded education, safe and healthy schools, and the effective use of technology. In addition, when state coordinators have questions or need assistance on statute-related areas, AIR works collaboratively with the respective federal program officer to address South Dakota's needs.

AIR is poised to facilitate South Dakota's revision of their social studies standards based on our proposed team's extensive content knowledge in social studies and our experience supporting teachers and instructional leaders with implementing both new standards, in general, and social studies standards, in particular. Our expertise also includes a deep understanding of inclusive practices, a history of applying research-based adult learning practices to deliver high-quality professional learning, and our capacity to plan and facilitate engaging cross-stakeholder meetings. Building strong, collaborative relationships between project staff and stakeholders from the project outset positively influences the entire capacity-building experience's depth and effectiveness. We possess an understanding of the current South Dakota social studies standards (2015). Recently, state leaders and stakeholders have been advocating for enhanced civics education in South Dakota schools, including a civics summit in 2019. Also, in 2018, the Oceti Sakowin Essential Understandings and Standards were developed. These two developments led to the need to review and revise the 2015 South Dakota Social Studies Standards.

In addition, AIR experts possess a **strong contextual knowledge** of and sensitivity to national, state, and regional factors that might impact the initiative's success. AIR has a comprehensive understanding of South Dakota's needs and the state context to identify risks and support the state in creating a plan to minimize the challenges of stakeholder engagement, standards revision, and standards implementation. This approach is strengthened by our commitment to

relationship building and understanding and applying **contextual knowledge** to increase success.

AIR will partner with SD DOE to coordinate, plan, and facilitate key components of the Social Studies Standards review work. Five tasks will carry us through the continuum of work, ensuring the completion of a new set of K–12 social studies standards:

- **Task 1:** AIR will provide a facilitator with a social studies background to work with SD DOE to select and facilitate a team to revise the Social Studies Content Standards.
- **Task 2:** AIR will work with the SD DOE to develop a process for the standards revision process.
- **Task 3:** AIR will work with the state to guide and facilitate the revision process.
- **Task 4:** AIR will work with the SD DOE to finalize the standards documents.
- **Task 5:** AIR work with the SD DOE to manage the technical writing committee in their revision of the standards.

Each task will be executed in a virtual working environment. AIR has extensive experience convening groups in-person or virtually to engage in stakeholder feedback or standards writing processes. We have adapted our entire process to work in-person and virtually. For example, while working with the Pennsylvania Department of Education to revise their science standards, school closures loomed in March 2020. We were able to pivot from in-person stakeholder engagement sessions to virtual sessions within an hour; there was no delay in conducting the session. We convened hundreds of stakeholders virtually to gather feedback about the revision of the standards. Our ability to successfully function in a virtual space continued into summer 2020, when we convened 70 content, steering, and writing committees to draft three sets of science standards for the Commonwealth of Pennsylvania.

AIR uses internal and external experts who work remotely and in offices throughout the United States and the world to share current national trends and has facilitators who worked with each state to help translate research and trends into state-specific practices. AIR facilitates stakeholder engagement through a collaborative and inclusive-led process. AIR has created processes and tools to help facilitate discussions, develop comprehensive guides to standards revision, and assist with implementation. AIR also has the centralized services critical to successful projects, including information technology, data science, and publication capabilities.

Our approach to this work is embodied in our commitment to maintaining client responsiveness, open communications, and producing the highest quality products. Our organization also brings a unique combination of skill, experience, creativity, and flexibility in working with our clients and executing the projects to their great satisfaction.

Proprietary information

We are requesting that Section 3.3.5 Financial Statements be proprietary and confidential information and be redacted from any public facing document. These are business sensitive documents and provided only for the purpose of evaluating eligibility to perform the work.

3.3.3 Examples of Similar Work

The following information lists four previous or current projects, performed by AIR, that are similar to the requirements of this RFP. No projects have been terminated, expired, or not renewed.

Exhibit 1. Client/contracting agency, dates, and descriptions of previous/current projects

3.3.3.1	Corey Epler Academic Officer Teaching, Learning and Assessment Nebraska Department of Education cory.epler@nebraska.gov	Lauren Gallicchio Social Studies Consultant Kentucky Department of Education lauren.gallicchio@education.ky.gov	Beverly Plein Director, Office of Standards Social Studies Coordinator New Jersey Department of Education Beverly.Plein@doe.nj.gov	Brian Gasper Division Chief of Instructional Quality Pennsylvania Department of Education brigasper@pa.gov
3.3.3.2	August 2016– September 2019	March 2018– September 2019	September 2018– September 2019	2020–Present
3.3.3.3	See below for a brief, written description of the specific prior services performed and requirements.	See below for a brief, written description of the specific prior services performed and requirements.	See below for a brief, written description of the specific prior services performed and requirements.	See below for a brief, written description of the specific prior services performed and requirements.

Corey Epler

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(August 2016–September 2019) Nebraska Content Area Standards Implementation Plan

This project included working with the Nebraska Department of Education (NDE) and the North Central Comprehensive Center (NCCC) to share research and promising practices of standards implementation. The work included planning three in-person task force meetings. During these meetings, AIR and NCCC staff shared examples from other states and focused on building the capacity of the state to make decisions moving forward. As part of this capacity-building work, NDE, AIR, and NCCC cofacilitated task force meetings, which were attended by state education agency (SEA) staff, local school staff, and regional education agencies that support the district,

called educational service units. The work led to the chief academic officer requesting AIR facilitation support for the revision of the Nebraska Social Studies Standards.

Lauren Gallicchio

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(March 2018–September 2019) Kentucky Department of Education Social Studies Standards Revision

AIR supported the Kentucky Department of Education to update the Kentucky Academic Standards for Social Studies to align them with current research and best practices. AIR facilitated 10 in-person sessions for the writing and review teams. AIR developed and executed an innovative process for convening the writing and review committee members to draft a set of Social Studies Standards. The process included facilitation strategies that guided committee members through the development of a set of common guiding principles to ground the work throughout the process. The Kentucky State Board of Education unanimously approved all the standards.

Beverly Plein

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(September 2018–September 2019) New Jersey Content Area Standards Revision Planning and Facilitation

This project included supporting the New Jersey Department of Education's Division of Academics and Performance to build the capacity of content specialists to facilitate the standards revision process. The work included monthly training sessions for content specialists focusing on planning for standards revision in world languages, fine arts, physical education, health, science, and 21st century skills. The work included the facilitation of the social studies standards revision process from beginning to end, including the facilitation of six in-person meetings with a writing team. It also included working with the social studies specialist to build a process for public comment and revisions based on public comment. The New Jersey State Board of Education unanimously approved all the standards.

Brian Gasper

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(2020–Present) Pennsylvania Integrated Standards for Science, Environment, Ecology, Technology, and Engineering Standards

The Pennsylvania Department of Education and Berks County Intermediate Unit contracted with AIR to update Pennsylvania’s Academic Standards for Science and Technology and the Academic Standards for Environment and Ecology (both from 2002) to align them with current research and best practices. AIR facilitated 14 stakeholder in-person and virtual sessions for nearly 960 members of the public. AIR developed and executed an innovative process for convening 74 content and steering committee members virtually to draft three sets of the standards (K–5 Science, Environment, Ecology, Technology and Engineering Standards; 6–12 Science, Environment, and Ecology Standards; and 6–12 Technology and Engineering Standards). The Pennsylvania State Board of Education unanimously approved all three draft standards.

3.3.4 Detailed Response

Section 3.3.4.1 The current social studies standards in South Dakota were last revised in 2015 (South Dakota Department of Education, 2015). Although the current standards have numerous strengths and cover a wide range of topics, they do not address the increasingly diverse perspectives and histories of the people of South Dakota. A revision of the standards will allow for the opportunity to connect and learn from the Oceti Sakowin Essential Understandings and Standards developed in 2018. In addition, the efforts of the state to ensure that each South Dakota student experiences a high-quality civics education as outlined in the 2020 Civics Action Plan is not addressed in the current standards. To produce a revised set of K–12 Social Studies Standards that include the state’s diverse and rich history and culture is a challenging undertaking. However, AIR’s expertise and organizational capacity enable us to meet the ambitious goal and timeline set forth by the RFP. Project timelines will be developed based on conversations with SD DOE and with the goal of accomplishing all the tasks proposed in an efficient and timely manner. Our expertise and organizational strengths are well suited for this work and are described in this proposal.

Founded in 1946, AIR is one of the largest not-for-profit behavioral and social science research and evaluation organizations in the world. We are committed to empowering communities and institutions with innovative solutions to the most critical challenges in education, health, workforce productivity, and international development. Most relevant to South Dakota’s needs is our position as a national leader in facilitating the revision of social studies standards. We draw our experience from supporting 11 states with their social studies revision processes. We have been at the forefront of social studies standards revision and implementation for more than 15 years—developing processes for standards revision, planning for the implementation of the standards, equipping educators with resources and tools to teach those standards, supporting effective measurement of students’ ability to meet those standards, and conducting research and keeping up with the field to keep current on the future and global demands of our students to support the next iteration of standards.

At AIR, we have a deep understanding of the latest research and practices in the social sciences. For example, Project Director Beth Ratway worked with 15 state social studies leaders as part of the Council of Chief State School Officers (CCSSO) Social Studies Collaborative to build an online tool outlining promising practices for social studies standards development and implementation. (See Appendix B for more details.). In addition, for the past 5 years, AIR staff have been engaged with state departments of education (i.e., SEAs) and with district leaders in Colorado, Nebraska, Hawaii, Iowa, Minnesota, Illinois, and Arkansas to support the development and implementation of social studies standards aligned to the *College, Career, and Civic Life Framework for Social Studies (C3 Framework)*. Ms. Ratway also authored the professional development section of the *Guardians of Democracy Report* and was the leading thought partner in the design and development of the American Enterprise Institute’s 2015 report, *Civic Education Professional Development, The Lay of the Land*.

AIR understands that many states, including South Dakota, do not promote a specific set of standards when supporting the revision of the standards. Although we have vast knowledge of social studies standards and bring that as a starting place, we do not use that for our ending place.

Our approach is to serve as facilitators to bring out the voices and the best standards for the state of South Dakota. Our approach is collaborative and involves close coordination with state and local stakeholders. The process of standards development begins with identifying and grounding the work in research. The next phase of the process is to build the capacity and professional knowledge of educators, educational leaders, and key staff by providing research and evidence to the stakeholders contributing to the revision of the standards. AIR experts offer guidance and support to stakeholders as they make informed decisions regarding the standards' content and structure. We will facilitate an effective and efficient process to harness the expertise. We will provide effective and efficient facilitation that recognizes and respects the work of the SD experts. Our purpose is to capture their knowledge and voices so that they can remain focused on their main work, students, while the important work of updating the standards can proceed.

Section 3.3.4.2 The following section outlines the scope of work to be completed as described in RFP #2258, Section 2. Tasks 1–5 are presented in bold with an overview of the activity described in the task and subtasks are presented in tables. Each table identifies the subtask, the focus of the subtask, and the activity that AIR will conduct to accomplish each subtask.

- **2.1 Task 1:** AIR will provide a facilitator with a social studies background to work with SD DOE to select and facilitate a workgroup to revise the Social Studies Content Standards.
- **2.2 Task 2:** AIR will work with the SD DOE to develop a process for the standards revision process.
- **2.3 Task 3:** AIR will work with the state to guide and facilitate the revision process.
- **2.4 Task 4:** AIR will work with the SD DOE to finalize the standards documents.
- **2.5 Task 5:** AIR work with the SD DOE to manage the technical writing committee in their revision of the standards.

2.1 Task 1: AIR will provide a facilitator with a social studies background to work with SD DOE to select and facilitate a workgroup to revise the Social Studies Content Standards.

As previously mentioned, AIR's Beth Ratway will work with the SD DOE to select and facilitate a workgroup of up to 50 participants to revise the Social Studies Content Standards with three to five participants in each grade level (K–8) and domain that refers to the subjects of geography, history, government, and economics in Grades 9–12. One participant for each grade level will serve as a table lead. AIR will support and train table leads in facilitating each grade level small group writing team. AIR will conduct weekly check-ins with the table leads as they engage in the standards writing process.

2.1.1 AIR will work with SD DOE to identify a diverse workgroup, reflective of the peoples of South Dakota. Diversity and inclusion are critical to this work. To ensure a diverse workgroup, AIR will work with SD DOE to craft an application process that allows for the identification of a variety of stakeholder voices. The application process includes an analysis of applications to ensure a diverse writing workgroup. AIR will provide a tracking tool for SD DOE to monitor participant interest and finalize the list of participants.

The workgroup will include the participants described in Exhibit 2.

Exhibit 2. Task 2.1 Participants

Task	Focus	AIR activity
2.1.1.1	SD K-12 educators who teach social studies content standards	AIR will work with SD DOE to identify 30 K–12 educators who teach social studies content standards. AIR's focus on standards revision is to bring educators to the table to be at the center of the work. AIR will share rubrics and best practices to identify and recruit individuals. These include outlining the key knowledge and skills needed to be a standards writer. AIR will work with SD DOE to develop a workgroup application that captures applicants' experience and expertise in each area previously identified. AIR will support the state in tracking individuals interested in serving on each workgroup.
2.1.1.2	School leaders, curriculum directors, or administrators	AIR will work with SD DOE to identify 10 school leaders, curriculum directors, or administrators. District-level educators bring an important voice to the bigger picture and purpose of standards. AIR will work with SD DOE to develop the criteria for identifying district-level educators for the standards writing process. These criteria may include experience in writing standards and overseeing them for the K–12 coordination of social studies in a school or district. AIR will support the state in tracking individuals interested in serving on each workgroup.
2.1.1.3	Post-secondary institutions	AIR will work with SD DOE to identify five postsecondary institutions. AIR will work with SD DOE to identify the key postsecondary educators who focus on the social studies disciplines and educator preparation programs. AIR will work with SD DOE to develop the criteria for identifying right postsecondary educators to the standards writing process. For example, the criteria may include experience in one of the four disciplines of social studies and experience working with K–12 teachers. AIR will support the state in tracking individuals interested in serving on each workgroup.
2.1.1.4	Business/Industry/School Board/Parents	AIR will work with SD DOE to identify five business/industry/school board/parent representatives. AIR will work with SD DOE to identify community leaders who are connected directly to preparing students for civic life. AIR will work with SD DOE to identify criteria for community and business partners who will add value to the standards writing process. For example, a criterion may include involvement in out-of-school programs focusing on the social studies disciplines and an emphasis on civic engagement activities or work. AIR will support the state in tracking individuals interested in serving on each workgroup.

Supporting Beth Ratway as facilitator is a team of AIR's standards experts with vast experience in social studies content, social-studies-specific professional learning, standards development, implementation, and assessment (see Appendix A for key personnel résumés). Our team also includes experts who have content knowledge and expertise with social-studies-based literacy instruction and inclusive practices. AIR's team is composed of highly qualified experts to carry out the proposed work. **Dr. Bobbi Newman**, a senior researcher, will serve as co-project director with responsibilities for the timeline, staffing, and budget. She will ensure that the scope is met within cost and schedule. To support these efforts, the project will be supported by experienced AIR facilitators and content specialists to support the lead facilitator. For example, **Kimberly Nicole Imel**, a research assistant, will collaborate with AIR staff to develop facilitation content, tools, and resources. **Traci Karageorge**, a technical assistance provider, has expertise in tribal communities and facilitating and facilitating groups of diverse stakeholders. She will serve as a content expert as well as an expert in facilitation. She has experience collaborating with SEAs. She will assist in developing content, tools, and processes to ensure tribal communities are reflected throughout the work. She also will facilitate some of the meetings and discussions.

AIR is poised to lead this work based on our proposed team's extensive content knowledge in social studies and our experience supporting teachers and instructional leaders with implementing both new standards, in general, and social studies standards, in particular. Our expertise also includes a deep understanding of inclusive practices, a history of applying research-based adult learning practices to deliver high-quality professional learning, and our capacity to plan and facilitate engaging cross-stakeholder meetings. Building strong, collaborative relationships between project staff and stakeholders from the project outset positively influences the entire capacity-building experience's depth and effectiveness.

2.2 Task 2: AIR will work with the SD DOE to develop a process for the standards revision process.

AIR will partner with SD DOE to coordinate, plan, and facilitate key components of the social studies standards' revision work. AIR will work with SD DOE leadership via weekly planning calls to communicate progress and next steps for the project. Task 2.2 will include planning for the facilitation of the writing team's process and outline all technical and professional support needed by teams to complete the revised standards. A key element of Task 2.2 is to ensure that the redeveloped standards are equitable and diverse. AIR uses the *Assessing Bias in Standards and Curricular Materials* from the Great Lakes Equity Center (Coomer et al, 2017) to consistently review the redevelopment process standards. AIR also incorporates the *Teaching Tolerance Social Justice Standards* as a tool for writing team members to ensure the final product includes opportunities for all students to see themselves reflected in the standards and build the development of student agency throughout.

Task 2.2 also will incorporate the following documents in the revision. Although this list is not an exhaustive list of the resources, research, and background information that the committees will consider, it is intended to provide a broad overview of the resources available to committee members.

- South Dakota Social Studies Content Standards (2015)
- South Dakota Social Studies Unpacked Documents (2020a)

- Oceti Sakowin Essential Understandings and Standards (2018b)
- South Dakota Standards for ELA (2018a)
- South Dakota Three Year State Plan to Support Effective Civics K–12 Education Draft (2019) and Civics Action Plan (2020b)
- National Council for the Social Studies (2010): *National Curriculum Standards for Social Studies: A Framework for Teaching, Learning, and Assessment*
- National Council for the Social Studies (2013a): *The College, Career, and Civic Life (C3) Framework for Social Studies State Standards: Guidance for Enhancing the Rigor of K-12 Civics, Economics, Geography, and History*
- National Council for the Social Studies. (2013b). *Social Studies for the Next Generation: Purposes, Practices, and Implications of the College, Career, and Civic Life (C3) Framework for Social Studies State Standard*
- Educating for American Democracy. (2021). *Educating for American Democracy: Excellence in History and Civics for All Learners*

AIR's extensive experience facilitating the standards review process is founded on reviewing research and evidence and examining best practices in the field.

2.2 AIR will complete the deliverables described in Exhibit 3.

Exhibit 3. Task 2.2 Deliverables

Task	Focus	AIR activity
2.2.1	Work with the State to understand the processes and goals for the 2021 meetings beginning in March 2021.	AIR will work with SD DOE during weekly meetings to understand the processes and goals for the 2021 meetings beginning in March 2021.
2.2.2	Review C3 Framework and current South Dakota social studies content standards and other SD DOE identified sources. The current South Dakota Social Studies Content Standards.	AIR will analyze the <i>College, Career, and Civic Life Framework for Social Studies (C3 Framework)</i> and the current South Dakota social studies content standards and other SD DOE identified sources and create a report outlining the key elements.
2.2.3	Conduct reviews of current research in Social Studies education and national and state work around Social Studies Standards.	AIR will review current research in social studies education and national and state work about social studies standards and create a final report for SD DOE and the writing team to review and use during the standards revision process.
2.2.4	Develop presentations and facilitation processes for revision meetings.	AIR will partner with SD DOE to develop presentations and facilitation processes for revision meetings. This will include a workplan and facilitation guide for the comprehensive review process that supports the goals of SD DOE for the

Task	Focus	AIR activity
		revision process. It also will include the development of a detailed timeline, processes, tools, and resources for the standards' revision process. AIR will build in a feedback process for SD DOE to share input following each facilitated session.
2.2.5	Develop a decision-making guide outlining a process on when to revise standards (structure and content).	AIR will develop a decision-making guide outlining a process on when to revise standards (structure and content) to support communication efforts and document key decision points made by the writing committee.
2.2.6	Create a process guide for writing team to revise the standards, architecture and provide justifications.	AIR will create a process guide for the writing team that will outline the strategies they will engage in to revise the standards and architecture and provide justifications to ensure coherency across all grade levels.

2.3 Task 3: AIR will work with the state to guide and facilitate the revision process.

At AIR, we work with states, districts, and schools to support and facilitate the development, revision, implementation, and assessment of academic and professional standards. Our experts create and compile tools and resources to help education leaders capitalize on their strengths and build their capacity to design achievable, common processes for revising and implementing their state standards. AIR experts have conducted standards work with more than 15 states through federally funded comprehensive and content centers (e.g., Texas Comprehensive Center, Southwest Comprehensive Center, Great Lakes Comprehensive Center) and the previously funded U.S. Department of Education's [State Support Network](#). The work includes thought partnering and designing the revision process, facilitating and cofacilitating the standards revision process, designing and developing a system for public feedback, and supporting the development of a comprehensive implementation plan to ensure that the standards are implemented with fidelity. AIR also has conducted analyses of state, national, and international standards in various content areas (e.g., alignment of standards to curriculum materials, comparison of state standards to national standards, comparison of assessment items to standards). These analyses have helped inform individual state revision processes. They have informed the development of the processes and tools that AIR uses when supporting standards with its standards revision, implementation, and assessment alignment work. AIR will bring this experience to the project to support the deliverables (see Section 2.3) and throughout the proposal. AIR has extensive experience with similar or relevant projects, as follows:

- ***Guide to Developing and Implementing Social Studies Standards (2018)***
AIR experts worked with the Social Studies Curriculum, Assessment and Instruction SCASS at CCSSO to author the [Guide to Developing and Implementing Social Studies Standards](#) (CCSSO, 2018). This guide focuses on supporting SEA social studies specialists in designing a comprehensive revision process and implementation plan. The tools and procedures can be used across content areas.

- ***Cross-State Development of Performance-Based Assessment Items in Civics (2018–2020)***
 This project included the facilitation of cross-state and state-level teams from Minnesota, Illinois, Wisconsin, and Iowa to develop performance-based assessment items in civics. The work consisted of training in developing performance assessment items focusing on civics, creating an online portal to house the items for local access, and developing training materials for states to use to further develop and train principals and teachers in designing performance-based assessment items.
- ***Colorado Standards Implementation Planning (2018–2020)***
 This project included working with the Colorado Department of Education (CDE) and the Central Comprehensive (CC) Center to develop a comprehensive plan for standards implementation. The work included planning in-person meetings with all the content leads at CDE. During these meetings, CC Center staff shared examples from other states and focused on building the capacity of CDE consultants to develop a common standards implementation plan. The work included developing online tools and resources to help districts and schools use the implementation framework.
- ***Nebraska Standards Implementation Planning (2016–2020)***
 This project included working with the Nebraska Department of Education (NDE) and the North Central Comprehensive Center (NCCC) to share research and promising practices of standards implementation. The work included planning three in-person task force meetings. During these meetings, NCCC staff shared examples from other states and focused on building the state's capacity to make decisions moving forward. As part of this capacity-building work, NDE and NCCC cofacilitated task force meetings attended by SEA staff, local school staff, and regional education agencies that support the district, called educational service units. The work included developing online tools and resources to help districts and schools use the implementation framework.
- ***Iowa Department of Education Core Standards Support (2014–2020)***
 This project included leading teams to support the implementation of the Iowa Core Standards. One team focused on designing online professional development modules to be used by regional service centers to develop a shared understanding of what it means to be a standards-based system. The work also included the design and development of a website and train the trainer sessions. The other areas of work focused on developing a process to design high-quality social studies standards connected to the C3 Framework. The work included developing a research-based strategy to design college and career-ready social studies standards and facilitate workgroups to write the standards and design implementation supports for the standards. The work included developing an intensive review process for the social studies standards. Current work includes developing professional development to support the initial implementation of the standards.
- ***Hawaii Department of Education Social Studies Standards Support (2015–2020)***
 This project included supporting the development of a revision process for the Hawaii Social Studies Standards. The project included working closely with the Hawaii social studies consultant continuously to develop processes, tools, and resources for the standards revision process. The work included creating protocols and rubrics to identify the writing team, frame the revision process, and integrate the C3 Framework into the revision process. It also included the cofacilitation of social studies leaders' monthly meetings to revise the secondary

social studies standards. The work included facilitating the review process for the secondary standards and facilitating the development of the elementary social studies standards.

- ***Colorado Social Studies Standards Gap Analysis (2016–2017)***

This project included conducting an in-depth analysis of the Colorado Social Studies Standards to the C3 Framework, other state standards, and international standards and frameworks. The work included using an alignment protocol and process and developing final reports, an analysis summary, and a transition map for revising the social studies standards. The work also included codeveloping plans to revise the standards and build implementation plans for the state and local levels.

- ***DoDEA Standards Gap Analysis (2014–2015)***

This project included leading four teams to conduct an in-depth analysis of the Department of Defense Education Activity (DoDEA) Mathematics and English Language Arts Standards and the Common Core State Standards, the DoDEA Science Standards, the Next Generation Science Standards, the DoDEA Social Studies standards, and the C3 Framework. The work included designing an alignment protocol and process, developing final reports, writing an analysis summary, and preparing a transition map for implementing each set of standards.

- ***Implementation of Minnesota Social Studies Standards (2014–2015)***

This project included collaborating with the Minnesota Department of Education to plan, design, and facilitate a set of statewide professional development workshops to help teachers in the field implement the new social studies standards. The work included designing a statewide survey for feedback regarding initial implementation issues; designing and facilitating workgroups to design tools and resources to support implementation; and the design, facilitation, and evaluation of six statewide professional development workshops.

AIR facilitates professional learning groups for educators through multiple venues and formats. We deliver face-to-face facilitation through national and regional institutes and conferences; state and local workshops; on-site programs; and distance learning using webinars, video conferences, online communities of practice, and online courses. AIR has extensive experience convening groups in-person or virtually to engage in stakeholder feedback or standards writing processes. We have adapted our entire process to work in-person and virtually. We have developed extensive resources and tools for the facilitation of workgroups virtually. For example, proposed staff worked closely with the Minnesota Department of Education to plan, design, and facilitate a set of six statewide professional development workshops grounded in research-based adult learning principles to help teachers build pedagogical content knowledge to implement new social studies standards. The work included developing a statewide survey for feedback regarding initial implementation issues, design, and facilitation of workgroups to create tools and resources to build pedagogical content knowledge and support implementation, facilitation, and evaluation of the workshops.

AIR will work with SD DOE throughout the process. For example, AIR will work with SD DOE to plan the facilitation of up to 10 virtual professional learning sessions with the writing committee identified in collaboration between AIR and SD DOE as described in Task 2.1.1. The work will include building a common language for standards, clarifying the definition of high-quality social studies standards, identifying evidence informed standards criteria, and building interrater reliability in the review and writing process. In Task 2.3, AIR will develop processes

and guides to ensure consistent formatting and focus between the writing teams so that the final K–12 document is coherent as one set of standards across all grade levels. A timeline of development activities will be finalized in collaboration with SD DOE upon award.

2.3 AIR will complete the deliverables described in Exhibit 4.

Exhibit 4. Task 2.3 Deliverables

Task	Focus	AIR activity
2.3.1.1	Facilitate writing team meetings to develop recommendations for revisions.	Develop presentations and facilitation processes for revision meetings. Share guiding principles and nonnegotiables for the work. AIR convenes workgroups through virtual platforms such as Zoom or GoToMeeting. Each workgroup is provided with an agenda, codeveloped with SD DOE, and a suite of templates specially designed for their grade level or subject level to accomplish each session's goals. Each workgroup is supported by an AIR facilitator to support the working group to accomplish the project's shared goals. Facilitation for up to 10 virtual sessions with writing committee.
2.3.1.2	Provide examples of other state standards architectures.	Create a landscape report outlining key research and best practices in social studies standards at the international, national, state, and local levels. Include a review of SD's recent efforts aimed at updating social studies standards. Share exemplars of social studies standards that are clearly defined and that can be operationalized and assessed.
2.3.1.3	Develop a recording tool to document revisions throughout the process.	Develop a decision-making guide outlining a process on when to revise standards (structure and content).
2.3.1.4	Facilitate writing team in making changes to standards, architecture and providing justifications for recommendations.	Share/review the overarching approach as well as the "structure/anatomy" of standards to be followed. Provide examples of architectures to inform the workgroup's decisions.
2.3.1.5	Create a report outlining the writing team recommendations.	Facilitate writing team in making changes to standards and architecture and providing justifications for recommendations. Create a report outlining the writing team recommendations.
2.3.1.6	Develop process to ensure final revisions are recorded.	Create a process guide for writing team to make revisions to the standards and architecture and provide justifications.

2.4 Task 4: AIR will work with the SD DOE to finalize the standards documents.

AIR will work with the SD DOE to finalize the standards documents. **The completion of Tasks 1–3 will result in a new set of K–12 Social Studies Standards for South Dakota** and a process/protocol to guide review of the draft standards. SD DOE and AIR will collaboratively develop a review process and timeline to incorporate feedback from SD DOE into the final draft. AIR will submit all reviewed items to SD DOE by July 16, 2021. SD DOE will have five business days to review the draft and submit final edits. AIR will work with SD DOE to make changes and provide justifications for recommendations to format and finalize the set of standards an agreed-on friendly format. We also will provide the standards in a single file, with all grade levels included, and a set of individual files divided by grade level. It will include a report outlining the entire revision process from start to finish. We will ensure the project meets all deliverable schedules, scope, and costs while ensuring quality. AIR has built-in checkpoints and feedback cycles to support on-time deliverables.

2.4 AIR will complete the deliverables described in Exhibit 5.

Exhibit 5. Task 2.4 Deliverables

Task	Focus	AIR activity
2.4.1.1	Put standards into user friendly format.	Share examples of standards templates and formats for SD DOE and technical writing committees to consider. AIR will develop a template for SD DOE standards that is accessible in different formats (printed and online).
2.4.1.2	Develop process/protocol to guide review of the draft standards.	Capture revision decisions in a tool that documents the committee's decision and justifications of each decision with supporting evidence.
2.4.1.3	Work with State social studies consultant to make changes and provide justifications for recommendations.	Using a final checklist and the process/protocol guide, work with the social studies consultant to provide justification statements for each decision.
2.4.1.4	Finalize changes.	Conduct full final editing and design process to finalize document.
2.4.1.4	Create final document.	Create final document. AIR has an in-depth quality assurance and editing process. Also, all documents created, drafts, and final copies will remain the property of SD DOE for open-source distribution.
2.4.1.6	Submit all reviewed items to the State by July 16, 2021.	Provide the state with final social studies standards document by July 16, 2021.

2.5 Task 5: AIR work with the SD DOE to manage the technical writing committee in their revision of the standards.

AIR will work with the state to manage the technical writing committee in their revision of the standards. AIR has put an experienced team in place, with project and grant management oversight provided by AIR. This team will provide leadership and guidance for the work; administrative and fiscal responsibility; and support for the execution of the project activities. The team will meet at least weekly to coordinate activities and share progress across tasks, troubleshoot challenges, and identify any midcourse corrections needed.

Management Infrastructure. AIR has management systems in place to plan, conduct, and monitor our work. We have more than 1,200 research, technical, administrative, and clerical personnel and organizational resources that include systems for communication, collaboration, publications, and tech support. We also use rigorous monitoring systems—including cost and schedule planning from the start of any project—which ensure that tasks are completed when due, at reasonable and expected costs, and with appropriate documentation. All systems support communication between project directors, senior leaders, and team members regarding critical management issues. AIR’s internal project review procedures require each project director to confer at least bimonthly with a project review team, which includes an independent senior project reviewer, a financial analyst, and a contract specialist. The review focuses on progress, client relationships, financial health, on-time performance, access to resources, quality assurance (QA) compliance, and data-governance. All project deliverables undergo QA review that is independent, continuous, expert driven, shared, and definitive.

Risk Management and Problem Solving. AIR’s project review process, coupled with cross-task coordination and ongoing communication with SD DOE, will facilitate the prompt identification and mitigation of potential problems. We will prioritize maintaining a positive and productive relationship with SD DOE and creating space to discuss successes and challenges. Likewise, we will prioritize sustaining trusting, collaborative relationships across the standards’ committees. We will ensure that all members have ample opportunities for input and access to information. If potential conflicts do arise, we will work with the teams promptly to resolve.

AIR Systems and Tools for Project Management. We will draw on our in-house business systems that track progress on key project indicators and ensure that projects are completed on time and within budget to support our work. These tools include Costpoint, the Corporate Reporting System, the Project Planning and Reporting System, OnBase, and time and expense reporting.

Given the extensive capacity described, the AIR team is ready to begin working on the contract start date and meet all project deadlines.

2.5 AIR will complete the deliverables described in Exhibit 6.

Exhibit 6. Task 2.5 Deliverables

Task	Focus	AIR activity
2.5.1	Facilitating the payment of stipends for table leads, for up to 50 committee members, and preparing all documentation and accounting associated with the stipend payments.	AIR will keep track of committee member attendance. AIR will pay stipends in the amount of up to \$1,000 per committee member, for up to 37 committee members, and \$1,500 per lead for each grade level, for up to 13 committee members upon completion of the standards document.
2.5.1.1	Submit all payment documentation upon completion of work.	Provide all necessary support to onboard and pay consultants. AIR has a Participant/Travel Accounting Report Form (PAR) to collect and document all information necessary for paying participant honorariums. Pay participants promptly. Upon successful completion of work, our accounts payable office will provide payment within 30 days of receiving the PAR. Submit verification of all payments. We will provide a listing of participants, a description of their work, the total stipend paid and date of payment(s).
2.5.1.2	Ensure completion of all necessary tax forms, including, but not limited to, W-9s.	Collect necessary information on the PAR to meet all federal requirements for tax and temporary employment. AIR is subject to yearly auditing and mitigates risk by insisting on the completion of all proper documentation to meet state and federal requirements. Auditors have routinely approved our processes for paying stipends for expert participants.

3.3.4.3 Although we do not anticipate an alternative process; we will work with the SD DOE to refine any processes and procedures as deemed necessary to execute the project deliverables. For example, our plan currently includes virtual engagement; however, this may be adjusted based on conversations with SD DOE to convene or work in person to facilitate the writing process. AIR is open to contract modifications if SD DOE would like to convene in-person work or other modifications.

3.3.5 Financial Statements

As stated in 3.3.2 Executive Summary, the following financial statements are proprietary.

5. Cost Proposal

The budget for this proposal categorizes estimated labor charges by the hour. Labor rates follow the approved rate for AIR. The budget includes all anticipated costs for labor, travel, and other direct costs to carry out the project's scope through five tasks:

- **Task 1:** AIR will provide a facilitator with a social studies background to work with SD DOE to select and facilitate a workgroup to revise the Social Studies Content Standards.
- **Task 2:** AIR will work with the SD DOE to develop a process for the standards revision process.
- **Task 3:** AIR will work with the state to guide and facilitate the revision process.
- **Task 4:** AIR will work with the SD DOE to finalize the standards documents.
- **Task 5:** AIR work with the SD DOE to manage the technical writing committee in their revision of the standards.

Budget Narrative

Task 1. Develop a team to fully support the revision process (\$13,335.00)

AIR is poised to lead this work based on our proposed team's extensive content knowledge in social studies and our experience supporting teachers and instructional leaders with implementing both new standards, in general, and social studies standards, in particular. Our expertise also includes a deep understanding of inclusive practices, a history of applying research-based adult learning practices to deliver high-quality professional learning, and our capacity to plan and facilitate engaging cross-stakeholder meetings. Building strong, collaborative relationships between project staff and stakeholders from the project outset positively influences the entire capacity-building experience's depth and effectiveness.

Task 2. Develop a comprehensive process for the standards revision process (\$16,676.00)

The Task 2 budget includes all costs required to create the final processes, tools, and resources needed to begin the revision process. It consists of a final landscape report, agendas and materials for each session, and participant materials.

Task 3. Guide and facilitate the revision process (\$64,178.00)

The Task 3 budget includes costs for conducting up to 10 virtual and/or face-to-face meetings, including technology costs. All meetings will be 7 hours in length. The budget includes funding for using an interactive webinar platform (such as Webex or GoToMeeting) to conduct the online meetings.

Task 4. Finalize the standards documents (\$33,385.00)

The Task 4 budget includes costs for editing and formatting the final standards document. It also includes staff time for facilitating meetings to make changes and adjustments to the standards based on public feedback.

Task 5: Manage the technical writing committee in their revision of the standards (\$75,045.00)

The Task 5 budget includes managing the writing committee in their revision of the standards. This includes facilitating the payment of stipends in the amount of up to \$1,000 per committee member, for up to 37 committee members, and \$1,500 per lead for each grade level, for up to 13 committee members and preparing all documentation and accounting associated with the stipend payments.

Costs

Notwithstanding any budgetary information provided herein, payment for each project component's services will be provided on a firm-fixed-price basis. Exhibit 6 outlines the total cost by task component. The budget narrative describes the composition of and justification for all proposed costs.

Exhibit 7. Budget Overview by Task

Task component	Cost
Task 1: Provide a facilitator with a social studies background to work with SD DOE to select and facilitate a team to revise the Social Studies Content Standards	\$13,335.00
Task 2: Develop a comprehensive process for the standards revision process.	\$16,676.00
Task 3: Guide and facilitate the revision process.	\$64,178.00
Task 4: Finalize the standards documents.	\$33,385.00
Task 5: Manage the technical writing committee in their revision of the standards.	\$75,045.00 \$99,605.00*
Total cost	\$202,620.00 \$227,179.00*
Changes provided by Consultant on May 20, 2021*	

AIR will work closely with SD DOE to develop a timeline and process that allows for the option of in-person convenings. The proposed timelines will be developed based on conversations with SD DOE.

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Appendices

Appendix A.

Résumés



Established in 1946, the American Institutes for Research® (AIR®) is a nonpartisan, not-for-profit organization that conducts behavioral and social science research and delivers technical assistance both domestically and internationally in the areas of education, health, and the workforce. AIR's work is driven by its mission to generate and use rigorous evidence that contributes to a better, more equitable world. With headquarters in Arlington, Virginia, AIR has offices across the U.S. and abroad. For more information, visit www.air.org.

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